

67 PTBMO1



Print - Close Window

**Subject:** DLGF Request for Information

**Date:** Thu, 6 Dec 2007 15:29:57 -0500

**From:** "Shawn Low" <ShawnLow@lflow.com>

**To:** "Stephanie Summitt-Campbell" <summittcampbell@yahoo.com>

Stephanie,

I had a call from Sherri requesting contract information. I will be faxing you a packet of what I believe you need to send to the DLGF in response to their Request for Information regarding your TAX system (we obviously can't help with the ASSESSMENT or other applications or services used by the Assessor). Below is a recap of what you should get.

- Note that there is no formal contract with us which is probably why you could not find one although we do have one with most of our other county customers. Maybe we should have one in place? Please let me know if you want me to send a proposed one that you could look at (or have your county attorney look at) and we could decide to implement retroactively for the applications you are using now if you thought that appropriate now.
- First thing in the fax you will get is copy of the original proposal and I believe it is a commissioners acceptance, for the Windows version of the TAX system when it was purchased in 2002. It may be hard to read as I can not read it very well. The numbers were \$ 70,000 for the application software and \$ 21,000 for Annual Maintenance. Please note however that the DLGF was asking for a contract (which you don't have as I explained above) so I am not sure whether it is appropriate to share this with them in lieu of or not. It does show the one-time purchase amount for the software and the 1<sup>st</sup> year projected annual maintenance fee which may be what they are looking for.
- Next you will get copies of invoices for 2005, 2006 and 2007 for Software Support and Maintenance (they asked for 3 years).
- Then you will have copy of invoice from 2006 to fund your Technical Service and Support fund. It should be noted that these amounts were for ALL applications that you use of our (not just TAX).
- Lastly you will get a copy of the fax I sent earlier this year with estimates for next year's budget (they asked for future expenditures too, if known). This included Software Support and Maintenance for PAYROLL AND FINANCIAL that is not applicable. The TAX amount obviously is. Note that the Technical Services and Support amount is for all applications (not just TAX) and therefore should not ALL be counted towards TAX.

Be sure to let me know if you have any questions once you have received and reviewed this.

THANKS

-----  
Shawn Low  
Low Associates  
[shawnlow@lflow.com](mailto:shawnlow@lflow.com)



## Windows Property Tax System

PUTNAM COUNTY  
TRM2

### BASE SOFTWARE:

Windows Property Tax System

Including: Complete Data Conversions and the  
the Charges Required by the Tax Restructuring Legislation

### SOFTWARE LICENSE FEE

\$100,000

### ANNUAL MAINTENANCE FEE

\$21,000

Sub Totals-Software License and Annual Maintenance Fees:

\$100,000

\$21,000

Current Customer Appreciation/DOS System Credit

(\$20,000)

TOTAL - Base Software License and Annual Maintenance Fees

\$79,385

\$21,000

### TRAINING AND INSTALLATION

### ESTIMATED

### DESCRIPTION

Base Software Training  
and Installation

### DAYS

10-18

\* As required  
through  
Technical Services  
Agreement

Plus Travel and Living Expenses

TOTAL - Services (\*)

(\*) See Technical Service/Support Agreement for future or additional training/service needs.

TOTAL - SOFTWARE LICENSE, SERVICES AND ANNUAL MAINTENANCE FEES:

\$79,385

\$21,000

The Software Charges will be completed in two phases.

Phase I - Software License Fee Due January 2003

\$35,000

Combination Windows/DOS system that includes required by the  
Tax Restructuring Legislation necessary for the Spring 2003 Tax  
Billing Cycle

Phase II - Software License Fee Due January 2004

\$35,000

Remainder of charges necessary to complete the full implementation  
to a Windows Tax System

A Pre-Payment Discount will be Applied to the Software License Fee at the Rate  
of 1 % Per Month for Payment made Prior to the Due Date.

Annual Maintenance Fee includes support questions regarding the application software via our software support phone number, or  
application software troubleshooting and resolution via a modem. If appropriate, application software support may also be provided  
via the internet, mail, or email. The Annual Maintenance Fee also includes software updates necessary to correct software defects or  
periodic software updates for enhancements to the application software provided by Low. Any services not covered by the Annual  
Maintenance Fee can be provided through the use of the Technical Service/Support Agreement.

\* Annual Maintenance Fee begins January 1, 2003

Your signature below indicates your acceptance of this proposal and the commitment.

Low Associates Sales Representative

Aug 5/2002  
Date

Donald K. Walton  
Authorization

The software proposed requires properly configured Network Hardware. For equipment requirements, see: www.low.com  
Low Associates is a Dell Computer provider and can supply all of the necessary equipment, including preparation and installation needs.



## Windows Property Tax System

PUTNAM COUNTY  
7/8/2002

### BASE SOFTWARE:

Windows Property Tax System  
Including: Complete Data Conversions and the  
the Changes Required by the Tax Restructuring Legislation

#### SOFTWARE LICENSE FEE

\$100,000

#### ANNUAL MAINTENANCE FEE

\$21,000

Sub Totals-Software License and Annual Maintenance Fees:

\$100,000

\$21,000

Current Customer Appreciation/DOS System Credit

(\$30,000)

TOTAL - Base Software License and Annual Maintenance Fees:

\$70,000

\$21,000

### TRAINING AND INSTALLATION

#### ESTIMATED

#### DESCRIPTION

#### DAYS

Base Software Training  
and Installation

10-15

\* As required  
through  
Technical Services  
Agreement

Plus Travel and Living Expenses

TOTAL - Services (\*)

(\*) See Technical Service/Support Agreement for future or additional training/service needs.

TOTAL - SOFTWARE LICENSE, SERVICES AND ANNUAL MAINTENANCE FEES:

\$70,000

\$21,000

The Software Changes will be completed in two Phases.

Phase I - Software License Fee Due January 2003

\$35,000

Combination Windows/DOS system that includes required by the  
Tax Restructuring Legislation necessary for the Spring 2003 Tax  
Billing Cycle

Phase II - Software License Fee Due January 2004

\$35,000

Remainder of changes necessary to complete the full implementation  
to a Windows Tax System

A Pre-Payment Discount will be Applied to the Software License Fee at the Rate  
of 1 % Per Month for Payment made Prior to the Due Date.

Annual Maintenance Fee includes support questions regarding the application software via our software support phone number, or  
application software trouble-shooting and resolution via a modem. If appropriate, application software support may also be provided  
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Low Associates Sales Representative

Date

Authorization

The software proposed requires properly configured Network Hardware. For equipment requirements, see: [www.low.com](http://www.low.com).  
Low Associates is a Dell Computer provider and can supply all of the necessary equipment, including preparation and installation needs.



# INVOICE

<b>BILL TO</b>
<b>PUTNAM COUNTY AUDITOR 1 W. WASHINGTON ST RM 20 GREENCASTLE, IN 46135</b>

<b>REMIT TO</b>
<b>L.L. LOW ASSOCIATES, INC. 210 N. IRONWOOD DRIVE SOUTH BEND, IN 46615 (574) 234-7240</b>

DATE	INVOICE #	P.O. NO.	CUSTOMER #	OBJECT	TERMS	DUE DATE
11/24/2004	15211		205-01680	055	NET DUE	1/1/2005
DESCRIPTION						AMOUNT
PUTNAM COUNTY AUDITOR						
FOR: JAN. 1, 2005 THRU JUNE 30, 2005						
PROPERTY TAX SYSTEM SOFTWARE SUPPORT AND MAINTENANCE						
APPLICATION SOFTWARE SUPPORT INCLUDES:						5,733.00
-PHONE/INTERNET/MAIL/EMAIL SUPPORT ON SOFTWARE USE						
-DIAL-IN APPLICATION SUPPORT VIA MODEM						
APPLICATION SOFTWARE MAINTENANCE INCLUDES:						5,733.00
-SOFTWARE MODIFICATION/UPDATES						
-CORRECTION OF SOFTWARE PROBLEMS						
-DIAL-IN SUPPORT VIA MODEM						
SPECIAL SUPPORT						
TO BE BILLED OR CHARGED TO TECHNICAL SERVICE ACCOUNT						
-PROGRAM MODIFICATIONS/TRAINING/NETWORKING						
-3RD PARTY SOFTWARE SUPPORT/DATA RECOVERY						
-HARDWARE SUPPORT						
<b>TOTAL</b>						<b>\$11,466.00</b>

Past due accounts will be charged 1.5 % per month.



# INVOICE

<b>BILL TO</b>
<b>PUTNAM COUNTY AUDITOR</b> <b>1 W. WASHINGTON ST RM 20</b> <b>GREENCASTLE, IN 46135</b>

<b>REMIT TO</b>
<b>L.L. LOW ASSOCIATES, INC.</b> <b>210 N. IRONWOOD DRIVE</b> <b>SOUTH BEND, IN 46615</b> <b>(574) 234-7240</b>

DATE	INVOICE #	P.O. NO.	CUSTOMER #	OBJECT	TERMS	DUE DATE
5/16/2005	15457		205-01680	055	NET DUE	7/1/2005
DESCRIPTION						AMOUNT
PUTNAM COUNTY AUDITOR						
FOR: JULY 1, 2005 THRU DEC. 31, 2005						
PROPERTY TAX SYSTEM SOFTWARE SUPPORT AND MAINTENANCE						
APPLICATION SOFTWARE SUPPORT INCLUDES:						5,733.00
-PHONE/INTERNET/MAIL/EMAIL SUPPORT ON SOFTWARE USE						
-DIAL-IN APPLICATION SUPPORT VIA MODEM						
APPLICATION SOFTWARE MAINTENANCE INCLUDES:						5,733.00
-SOFTWARE MODIFICATION/UPDATES						
-CORRECTION OF SOFTWARE PROBLEMS						
-DIAL-IN SUPPORT VIA MODEM						
SPECIAL SUPPORT						
TO BE BILLED OR CHARGED TO TECHNICAL SERVICE ACCOUNT						
-PROGRAM MODIFICATIONS/TRAINING/NETWORKING						
-3RD PARTY SOFTWARE SUPPORT/DATA RECOVERY						
-HARDWARE SUPPORT						

*Past due accounts will be charged 1.5 % per month.*

**TOTAL** **\$11,466.00**



# INVOICE

<b>BILL TO</b>
<b>PUTNAM COUNTY AUDITOR</b> <b>1 W. WASHINGTON ST RM 20</b> <b>GREENCASTLE, IN 46135</b>

<b>REMIT TO</b>
<b>L.L. LOW ASSOCIATES, INC.</b> <b>210 N. IRONWOOD DRIVE</b> <b>SOUTH BEND, IN 46615</b> <b>(574) 234-7240</b>

DATE	INVOICE #	P.O. NO.	CUSTOMER #	OBJECT	TERMS	DUE DATE
11/8/2005	15736		206-01680	055	NET DUE	1/1/2006
DESCRIPTION						AMOUNT
PUTNAM COUNTY AUDITOR						
FOR: JAN. 1, 2006 THRU JUNE 30, 2006						
PROPERTY TAX SYSTEM SOFTWARE SUPPORT AND MAINTENANCE						
APPLICATION SOFTWARE SUPPORT INCLUDES:						6,021.00
-PHONE/INTERNET/MAIL/EMAIL SUPPORT ON SOFTWARE USE						
-DIAL-IN APPLICATION SUPPORT VIA MODEM						
APPLICATION SOFTWARE MAINTENANCE INCLUDES:						6,021.00
-SOFTWARE MODIFICATION/UPDATES						
-CORRECTION OF SOFTWARE PROBLEMS						
-DIAL-IN SUPPORT VIA MODEM						
SPECIAL SUPPORT						
TO BE BILLED OR CHARGED TO TECHNICAL SERVICE ACCOUNT						
-PROGRAM MODIFICATIONS/TRAINING/NETWORKING						
-3RD PARTY SOFTWARE SUPPORT/DATA RECOVERY						
-HARDWARE SUPPORT						
PUT TREAS (PUT3) PAID OUT OF THEIR TECH SERV ACCT. FOR HALF OF THIS INVOICE						-6,021.00

**\$12,042**

Past due accounts will be charged 1.5 % per month.

**TOTAL \$6,021.00**



## Computer Software and Systems Design Specialists

# INVOICE

**BILL TO**

**PUTNAM COUNTY AUDITOR**  
**1 W. WASHINGTON ST RM 20**  
**GREENCASTLE, IN 46135**

REMIT TO	
<b>L.L. LOW ASSOCIATES, INC.</b> <b>210 N. IRONWOOD DRIVE</b> <b>SOUTH BEND, IN 46615</b> <b>(574) 234-7240</b>	

DATE	INVOICE #	P.O. NO.	CUSTOMER #	OBJECT	TERMS	DUE DATE
5/9/2006	15986		206-01680	055	NET DUE	7/1/2006
DESCRIPTION						AMOUNT
PUTNAM COUNTY AUDITOR						
FOR: JULY 1, 2006 THRU DECEMBER 31, 2006						
PROPERTY TAX SYSTEM SOFTWARE SUPPORT AND MAINTENANCE						
APPLICATION SOFTWARE SUPPORT INCLUDES:						6,021.00
-PHONE/INTERNET/MAIL/EMAIL SUPPORT ON SOFTWARE USE						
-DIAL-IN APPLICATION SUPPORT VIA MODEM						
APPLICATION SOFTWARE MAINTENANCE INCLUDES:						6,021.00
-SOFTWARE MODIFICATION/UPDATES						
-CORRECTION OF SOFTWARE PROBLEMS						
-DIAL-IN SUPPORT VIA MODEM						
SPECIAL SUPPORT						
TO BE BILLED OR CHARGED TO TECHNICAL SERVICE ACCOUNT						
-PROGRAM MODIFICATIONS/TRAINING/NETWORKING						
-3RD PARTY SOFTWARE SUPPORT/DATA RECOVERY						
-HARDWARE SUPPORT						
OCR ON TAX BILL (LOCKBOX) MAINTENANCE (5 LICENSES)						250.00

**Past due accounts will be charged 1.5 % per month.**

<b>TOTAL</b>	<b>\$12,292.00</b>
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## LOW ASSOCIATES

## Computer Software and Systems Design Specialists

REMIT TO	
<b>L.L. LOW ASSOCIATES, INC.</b> <b>210 N. IRONWOOD DRIVE</b> <b>SOUTH BEND, IN 46815</b> <b>(574) 234-7240</b>	

**Past due accounts will be charged 1.5 % per month.**

**TOTAL**

**\$13,170.00**





Computer Software and Systems Design Specialists

# INVOICE

**BILL TO**

**PUTNAM COUNTY AUDITOR  
1 W. WASHINGTON ST RM 20  
GREENCASTLE, IN 46135**

**REMIT TO**

**L.L. LOW ASSOCIATES, INC.  
210 N. IRONWOOD DRIVE  
SOUTH BEND, IN 46615  
(574) 234-7240**

DATE	INVOICE #	P.O. NO.	CUSTOMER #	OBJECT	TERMS	DUE DATE
6/11/2007	16529		207-01680	055	NET DUE	7/13/2007

**DESCRIPTION****AMOUNT**

PUTNAM COUNTY AUDITOR FOR: JULY 1, 2007 THRU DECEMBER 31, 2007

**PROPERTY TAX SYSTEM SOFTWARE SUPPORT AND MAINTENANCE**

- PROPERTY TAX SYSTEM
- REAL ESTATE ASSESSED VALUE INTERFACE
- MOBILE HOME ASSESSED VALUE INTERFACE
- 2003A DATA EXPORT
- TAX HISTORY RETENTION
- LOCK BOX PROCESSING

**OPTIONAL SOFTWARE INCLUDED:**

- OCR LINE FOR LOCK BOX PROCESSING
- PROPERTY PROJECTS (DITCH RECONSTRUCTION)

**APPLICATION SOFTWARE SUPPORT INCLUDES:**

- PHONE/INTERNET/MAIL/EMAIL SUPPORT ON SOFTWARE USE
- DIAL-IN APPLICATION SUPPORT VIA MODEM

6,585.00

**APPLICATION SOFTWARE MAINTENANCE INCLUDES:**

- SOFTWARE MODIFICATION/UPDATES
- CORRECTION OF SOFTWARE PROBLEMS
- DIAL-IN SUPPORT VIA MODEM

6,585.00

**SPECIAL SUPPORT BILLED OR CHARGED TO TECH. SERVICE ACCT.**

- PROGRAM MODIFICATIONS/TRAINING/NETWORKING
- 3RD PARTY SOFTWARE SUPPORT/DATA RECOVERY
- HARDWARE SUPPORT

*Past due accounts will be charged 1.5 % per month.*

**TOTAL \$13,170.00**



## LOW ASSOCIATES

**Computer Software and Systems Design Specialists**

## REMIT TO

**L.L. LOW ASSOCIATES, INC.**  
**210 N. IRONWOOD DRIVE**  
**SOUTH BEND, IN 46815**  
**(574) 234-7240**

DATE	INVOICE #	P.O. NO.	CUSTOMER #	OBJECT	TERMS	DUE DATE
11/14/2006	16260		207-01680	021	NET 30	1/1/2007
DESCRIPTION						AMOUNT
<b>PUTNAM COUNTY AUDITOR</b>  <b>TECHNICAL SERVICE/SUPPORT</b>  <b>INCLUDES:</b> <b>-INSTALLATION/REPAIR OF HARDWARE</b> <b>-SOFTWARE MODIFICATIONS</b> <b>-TRAINING</b> <b>-DATA RECOVERY</b> <b>-RELATED THINGS USING LOW APPLICATION SOFTWARE</b>  <b>ADDITIONAL SPECIAL SUPPORT TO BE BILLED AT CURRENT SPECIAL RATE PLUS EXPENSES</b>						14,250.00

**Past due accounts will be charged 1.5 % per month.**

<b>TOTAL</b>	<b>\$14,250.00</b>
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# INVOICE

<b>BILL TO</b>
<b>PUTNAM COUNTY TREAS.</b> <b>1 W. WASHINGTON ST</b> <b>GREENCASTLE, IN 46135</b>

<b>REMIT TO</b>
<b>L.L. LOW ASSOCIATES, INC.</b> <b>210 N. IRONWOOD DRIVE</b> <b>SOUTH BEND, IN 46615</b> <b>(574) 234-7240</b>

DATE	INVOICE #	P.O. NO.	CUSTOMER #	OBJECT	TERMS	DUE DATE
11/14/2006	16261		207-01681	021	NET 30	1/1/2007
DESCRIPTION						AMOUNT
<b>PUTNAM COUNTY TREASURER</b>  <b>TECHNICAL SERVICE/SUPPORT</b>  <b>INCLUDES:</b> -INSTALLATION/REPAIR OF HARDWARE -SOFTWARE MODIFICATIONS -TRAINING -DATA RECOVERY -RELATED THINGS USING LOW APPLICATION SOFTWARE  <b>ADDITIONAL SPECIAL SUPPORT TO BE BILLED AT CURRENT SPECIAL RATE PLUS EXPENSES</b>						14,250.00

*Past due accounts will be charged 1.5 % per month.*

**TOTAL \$14,250.00**

L L LOW ASSOCIATES  
210 N IRONWOOD DRIVE  
SOUTH BEND, IN 46615

FACSIMILE TRANSMITTAL SHEET

TO:	FROM:
Stephanie / Sharon	Shawn Low
COMPANY:	DATE:
Putnam County Auditor/Treasurer	June 8, 2007
FAX NUMBER:	TOTAL NO. OF PAGES INCLUDING COVER:
(765)653-5992 / (765)653-1719	1
PHONE NUMBER:	SENDER'S REFERENCE NUMBER:
RE:	YOUR REFERENCE NUMBER:
2008 Budget	

☐ URGENT ☒ FOR REVIEW ☐ PLEASE COMMENT ☐ PLEASE REPLY ☐ PLEASE RECYCLE

NOTES/COMMENTS:

Stephanie/Sharon,

For Budgeting purposes, please see the projected annual maintenance fees and Technical Service / Support amounts below for next year.

Financial Payroll Suite System Annual Maintenance	\$14,320 NA
Property Tax System Annual Maintenance	<del>\$27,650</del>
License Excise Tax	\$ 1,522 NA
Technical Services (Estimated 150 Hours Min)	\$14,550 (Auditor)
Technical Services (Estimated 150 Hours Min)	\$14,550 (Treasurer)

ALL APPLICATIONS  
NOT JUST TAX

Funds have not been included to purchase any new hardware. I would recommend that you plan to budget a reasonable amount annually so you have a more consistent annual budget amount. This funding could be added and used via Technical Service / Support if desired. It is time to think about updating your servers.

Let me know if you have any questions.

Shawn Low